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Grain Transportation Report

August 24, 2023

A weekly publication of the Agricultural Marketing Service

www.ams.usda.gov/GTR

FMC Seeks Input on Initiatives To Address Supply-Chain Bottlenecks.

The Federal Maritime Commission (FMC) [seeks public feedback](#) on three proposals to improve the performance of the U.S. international ocean freight delivery system at three ports, including the Ports of Los Angeles and Long Beach. The initiative seeks to provide clarity and predictability in three practices by international ocean carriers and marine terminal operators: returning containers, setting early return dates, and providing notice of container availability for pick up.

Agricultural exporters have identified these practices as key bottlenecks—contributing to congestion and unreasonable demurrage and detention charges—in the U.S. international ocean supply chain. FMC will receive comments until September 15, 2023.

Columbia Snake River System Scheduled Closures for Annual Maintenance Early 2024.

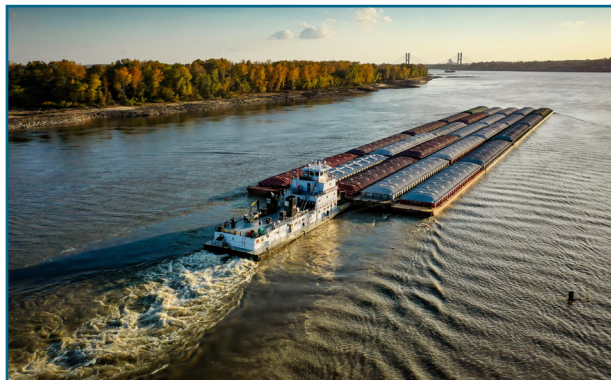
The U.S. Army Corps of Engineers has scheduled [annual maintenance](#) on the Columbia Snake River System (CSRS) for January 14, 2024, to March 29, 2024. The outage is scheduled for an extended period to allow for the completion of multiple projects at different navigation lock facilities.

Maintenance projects will include electrical upgrades, structural improvements, repair of damaged concrete, and other work. The locks to be closed include McNary, Ice Harbor, Lower Monumental, Little Goose, Lower Granite, and John Day. From 2016 to 2020,

between [27.9 million tons and 32.7 million](#) tons of grain was shipped on or through the CRS, with wheat shipments accounting for 12.7 million tons to 16.4 million tons.

New Road Eases Access to Port of Blencoe Barge Terminal. A recently completed [new rural freight road](#) allows agricultural freight movements from Interstate (I) 29 directly to Iowa’s Port of Blencoe terminal, on the Missouri River—halfway between Sioux City, IA, and Omaha, NE. The road project was funded by a 2021 U.S. Department of Commerce grant to improve road access to the Port of Blencoe.

Iowa producers rely on the highway system to transport goods to elevators and barge terminals and the inland waterways to ship to Gulf Coast ports. Since the Blencoe terminal opened in 2021, one Iowa farmers cooperative, so far, has saved 58,000 gallons of fuel, because they no longer need to truck fertilizer all the way from Mississippi River ports. The new rural freight road connecting I-29 and the Blencoe terminal has further streamlined these deliveries.



Changes to Soybean Grading Standards Enhance Supply-Chain Efficiency. USDA’s Agricultural Marketing Service (AMS) issued a [final rule](#), effective September 1, removing “Soybeans of Other Color” (SBOC) as a grade-determining factor for soybeans. Under the current grading factors, yellow soybeans receive lower grades when their seed coats are green, brown, or black. Historically, SBOC levels have been low, but in recent years a growing share of soybeans have received a lower grade for being discolored.

In March, AMS requested public comment on this rule. All commenters supported removing SBOC as a grade factor, noting its irrelevance in light of [research](#) showing that SBOC levels have no relationship to soybean protein or oil content. The rule change should increase fluidity along the soybean supply chain from farm to market and result in fewer delays.



Export Sales

For the week ending August 10, [unshipped balances](#) of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 8.40 million metric tons (mmt), down 5 percent from last week and down 34 percent from the same time last year.

Net [corn export sales](#) for MY 2022/23 were 0.233 mmt, up 55 percent from last week. Net [soybean export sales](#) were 0.094 mmt, down 77 percent from last week. Net weekly [wheat export sales](#) for MY 2023/24, were 0.360 mmt, down 37 percent from last week.

Rail

U.S. Class I railroads originated 14,533 [grain carloads](#) during the week ending August 12. This was a 7-percent decrease from the previous week, 28 percent fewer than last year, and 26 percent fewer than the 3-year average.

Average September [shuttle secondary railcar bids/offers](#) (per car) were \$100 below tariff for the week ending August 17. This was \$146 less than last week and \$585 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$163 above tariff. This was \$63 less than last week and \$75 lower than this week last year.

Barge

For the week ending August 19, [barged grain movements](#) totaled 189,495 tons. This was 47 percent less than the previous week and 47 percent less than the same period last year.

For the week ending August 19, 119 grain barges [moved down river](#)—114 fewer than last week. There were 422 grain barges [unloaded](#) in the New Orleans region, 1 percent fewer than last week.

Ocean

For the week ending August 17, 18 [oceangoing grain vessels](#) were loaded in the Gulf—31 percent fewer than the same period last year. Within the next 10 days (starting August 18), 33 vessels were expected to be loaded—3 percent more than the same period last year.

As of August 17, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$52.00. This was 8 percent more than the previous week. The rate from the Pacific Northwest to Japan was \$27.50 per mt, 6 percent more than the previous week.

Fuel

For the week ending August 21, the U.S. average [diesel fuel price](#) increased 1.1 cents from the previous week to \$4.389 per gallon, 52.0 cents below the same week last year.



The Grain Transportation Report Has a New Look, New Feel, New Features

Today, USDA’s Agricultural Marketing Service (AMS) launches a newly redesigned Grain Transportation Report (GTR)! Your GTR Team has worked diligently over the past year to build a new look and feel for one of USDA’s most longstanding flagship publications. In one form or another USDA has been tracking agricultural transportation since **at least the 1940s**, so the GTR has had a long lineage of precursors.

Although the GTR has been revamped many times over the years, it was overdue for its latest overhaul. The redesigned GTR builds in more accessibility for readers using assistive technologies and provides a modernized experience for all readers.

Why an Update?

It was time for a refresh! More than 15 years have passed since AMS last updated the GTR. The revamped design offers consistent formatting for easier readability and interpretation for all users. In addition, the redesigned GTR fully conforms with the main government standards for making information and data accessible to persons with disabilities (i.e., Section 508 of the Rehabilitation Act and Section 255 of the Communications Act). In the following ways, the redesigned GTR offers greater accessibility:

- Provides alternative text of charts and graphs (for reading assistant technology),
- Uses contrasting colors and patterns in charts and graphs,

Figure 1. Former (top) and current (bottom) GTR tables for U.S. corn export sales

Before	For the week ending 8/10/2023			Total commitments ²	% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2023/24 next MY	2022/23 current MY	2021/22 last MY			
		1,000 mt -				-1,000 mt -
	Mexico	3,830	15,360	16,879	(9)	15,227
	China	272	7,584	14,796	(49)	12,616
	Japan	908	6,839	10,118	(32)	10,273
	Columbia	50	2,388	4,403	(46)	4,398
	Korea	1	821	1,476	(44)	2,563
	Top 5 importers	5,061	32,992	47,672	(31)	45,077
	Total U.S. corn export sales	6,678	40,549	60,950	(33)	56,665
	% of YTD current month's export projection	13%	98%	97%		
	Change from prior week ²	705	233	99		
	Top 5 importers' share of U.S. corn export sales	76%	81%	78%		80%
	USDA forecast August 2023	52,163	41,349	62,901	(34)	
	Corn use for ethanol USDA forecast, August 2023	134,620	132,715	135,281	(2)	

After	For the week ending 8/10/2023	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2019-21 (1,000 mt)
		YTD MY 2023/24	YTD MY 2022/23	YTD MY 2021/22		
	Mexico	3,830	15,360	16,879	-9	15,227
	China	272	7,584	14,796	-49	12,616
	Japan	908	6,839	10,118	-32	10,273
	Columbia	50	2,388	4,403	-46	4,398
	Korea	1	821	1,476	-44	2,563
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- Uses consistent heading styles, and
- Ensures table columns and rows are appropriately labeled and configured.

Readers can expect all the same great market and transportation data they have come to know and rely on. Plus, the new “packaging” will enhance the GTR experience for all users, in the following aspects:

Colors. The modern design uses color and patterning to offer a uniform format throughout the document. Figure 1 contains a “before and after” comparison of **GTR table 13** (formerly, GTR table 12)—U.S. corn export sales. Similarly, figure 2 (p. 4) shows the current and previous designs for the volume of grain inspected by region (**GTR fig. 15**; formerly, GTR fig. 14). Throughout, the new look is cleaner and more internally consistent across tables (and charts).

Layout. The report's orientation is now landscape (formerly, portrait), which better fits wide screens and makes content easier to see. Weekly highlights and snapshots now span two pages. All written material, including the weekly feature article, is presented in multiple columns (rather than in one single wide column), for improved readability. Throughout, tables and graphics have been restructured. For instance, textboxes have been pulled out of the charts for cleaner presentation.

Additional analyses. To better compare changes over time, [GTR table 1](#) now offers the previous year comparisons. In addition, the new [GTR figure 1](#) (fig. 3) illustrates historical trends in transportation costs. For instance, the figure highlights the large increase in barge rates in 2022 in response to low water levels on the Mississippi River System (MRS), as well as the recently low barge rates resulting from low export grain movements. MRS water levels are currently low and forecast even lower in the near future. This new chart will be a useful tool in tracking barge and other grain transportation rates as harvest unfolds.

Experience the Redesign for Yourself!

Please browse the report and, at the email below, send us any feedback you have—e.g., regarding content, design, accessibility, and ease of use. We want to ensure the upgrades meet your needs and expectations. Data users can still find historical data on our [website](#) as well as on [AgTransport](#).

GTRContactUs@usda.gov

Figure 2. Former (top) and current (bottom) GTR figures for the amount of grain inspected for export

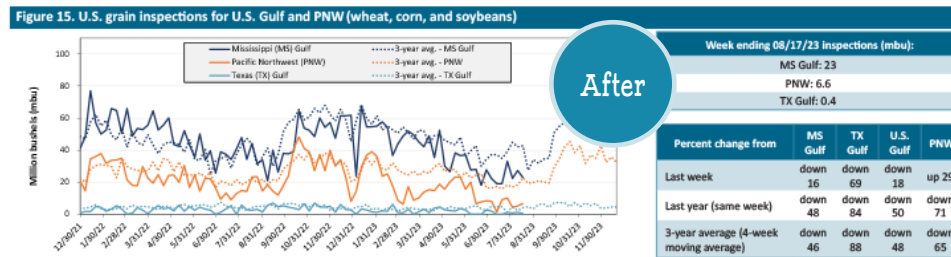
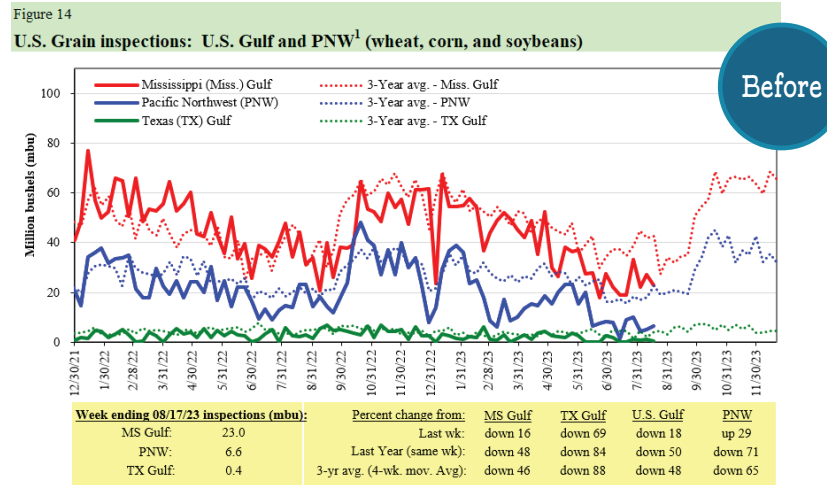
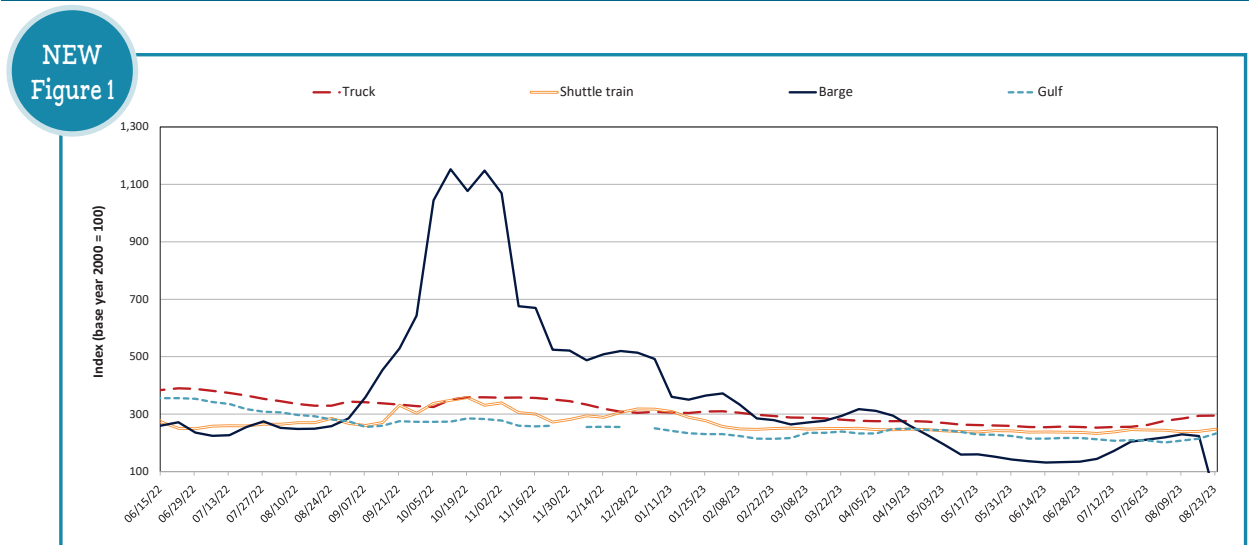


Figure 3. New GTR figure 1 showing modal cost indicators over time



Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

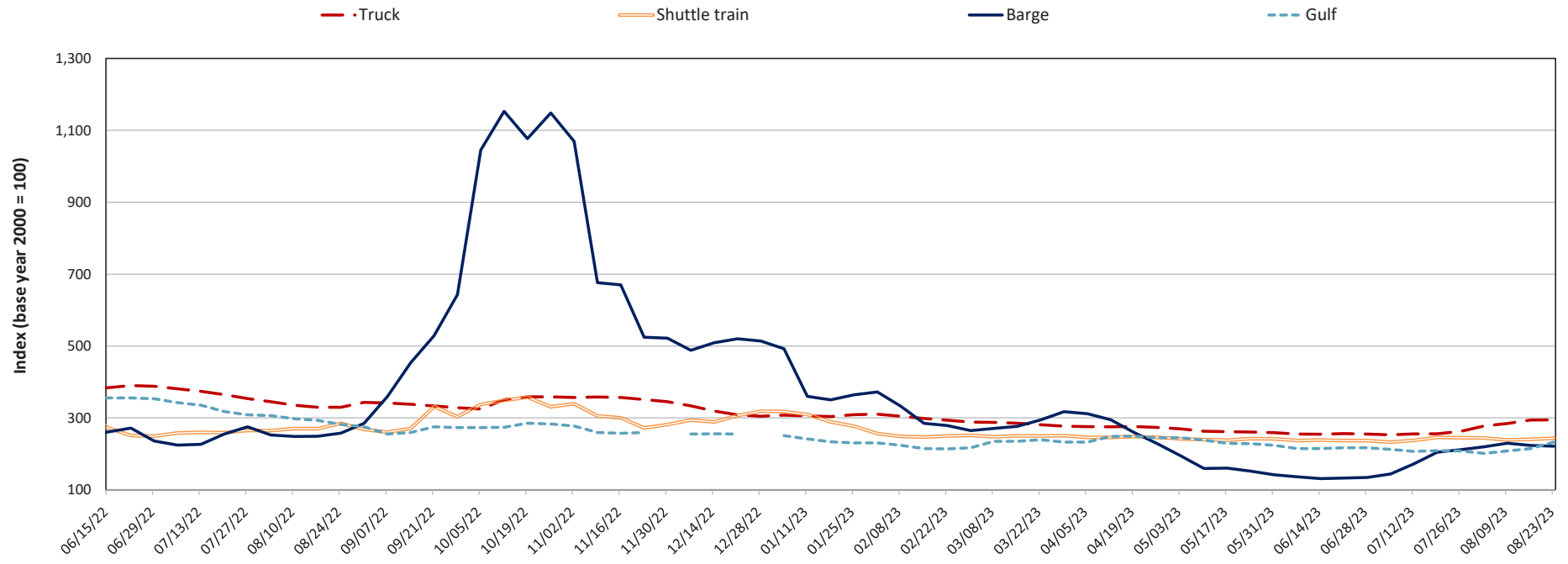
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
08/23/23	295	327	243	221	233	195
08/16/23	294	322	240	223	215	184
08/24/22	329	345	285	258	282	303

Note: Indicator: Base year 2000 = 100. Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); ocean = routes to Japan (\$/metric ton); n/a = not available due to holiday.

Source: USDA, Agricultural Marketing Service.

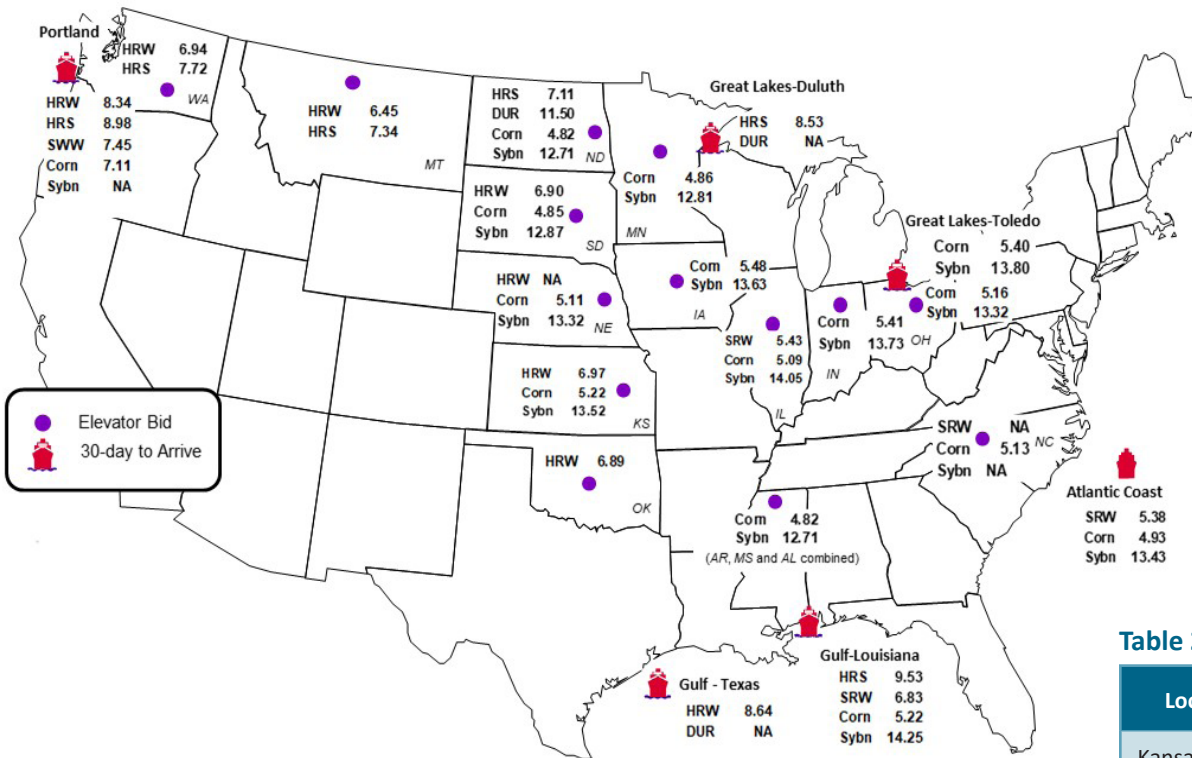
Figure 1. Grain transportation cost indicators as of week ending 08/23/23



Source: USDA, Agricultural Marketing Service.

Figure 2. Grain bid summary

The grain bid summary illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.



Inland bids: 12% HRW, 14% HRS, #1 SRW, #1 DUR, #1 SWW, #2 Y Corn, #1 Y Soybeans
 Export bids: Ord HRW, 14% HRS, #2 SRW, #2 DUR, #2 SWW, #2 Y Corn, #1 Soybeans
 Note: Data from tables 2a and 2b derived from map information.
 Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

Table 2a. Market update: U.S. origins to export position price spreads (\$/bushel)

Commodity	Origin-destination	8/18/2023	8/11/2023
Corn	IL-Gulf	-0.13	-0.10
Corn	NE-Gulf	-0.11	-0.11
Soybean	IA-Gulf	-0.62	-1.53
HRW	KS-Gulf	-1.67	-1.61
HRS	ND-Portland	-1.87	-1.83

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.
 Source: USDA, Agricultural Marketing Service.

Table 2b. Futures

Location	Grain	Month	8/18/2023	Week ago 8/11/2023	Year ago 8/19/2022
Kansas City	Wheat	Dec	7.552	7.492	8.444
Minneapolis	Wheat	Dec	8.124	8.122	8.826
Chicago	Wheat	Dec	6.352	6.220	7.682
Chicago	Corn	Dec	4.96	4.842	6.234
Chicago	Soybean	Nov	13.764	13.204	14.126

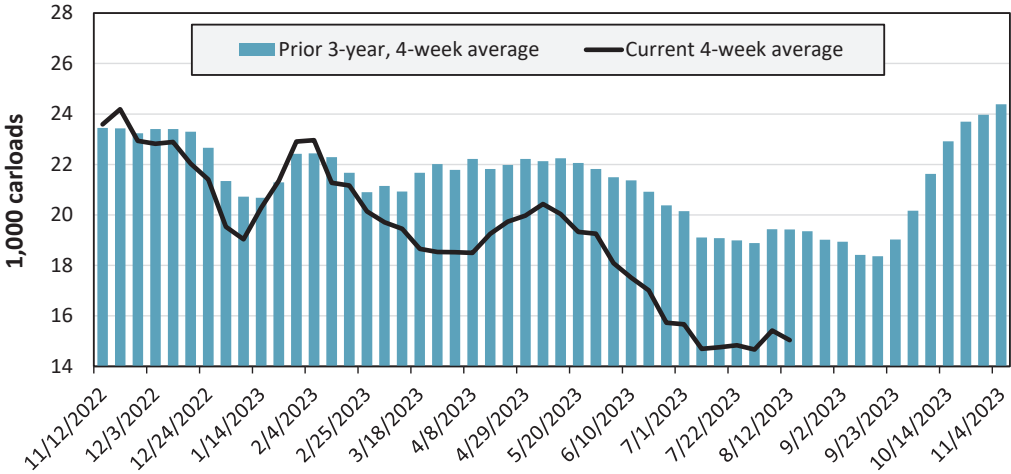
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 8/12/2023	East		West		U.S. total	Central U.S./Canada	
	CSXT	NS	BNSF	UP		CPKC	CN
This week	1,484	2,202	6,887	3,960	14,533	4,624	2,561
This week last year	1,714	2,344	9,349	6,821	20,228	8,164	2,061
2023 YTD	57,685	85,406	278,670	168,043	589,804	283,785	139,576
2022 YTD	57,798	79,050	351,795	184,189	672,832	283,786	109,524
2023 YTD as % of 2022 YTD	100	108	79	91	88	100	127
Last 4 weeks as % of 2022	72	89	72	78	76	107	115
Last 4 weeks as % of 3-yr. avg.	80	93	70	83	77	93	99
Total 2022	93,428	130,626	570,232	296,945	1,091,231	538,276	213,914

Note: The last 4-week percentages compare the last 4 weeks of this year to the closest 4 weeks last year, and to the average across the prior 3 years. The U.S. total column excludes CPKC. NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; YTD = year-to-date; avg. = average; yr. = year.
Source: Association of American Railroads.

Figure 3. Total weekly U.S. Class I railroad grain carloads



For the 4 weeks ending August 12, grain carloads were down 2 percent from the previous week, down 24 percent from last year, and down 23 percent from the 3-year average.

Source: Association of American Railroads.

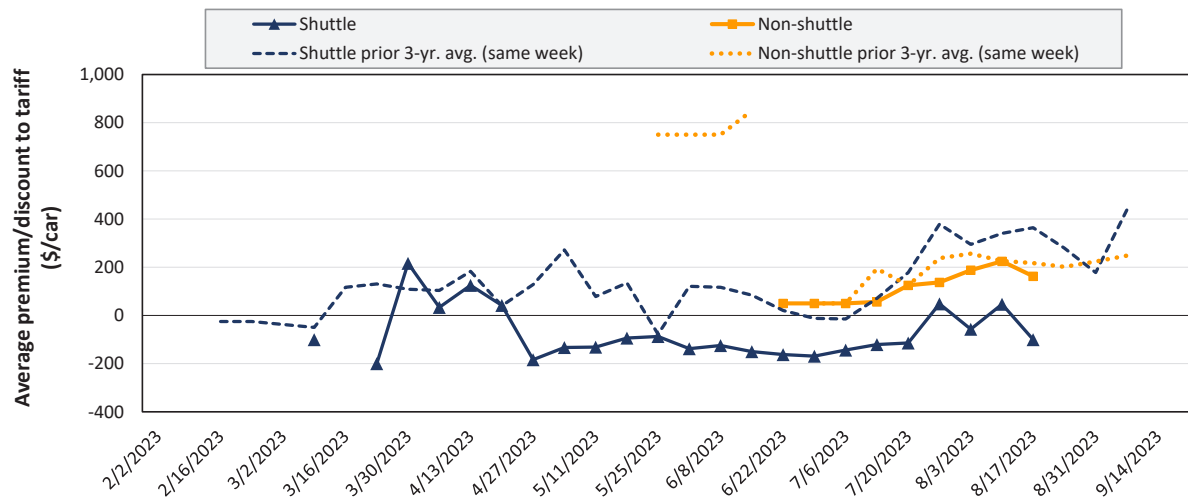
Table 4. Railcar auction offerings (dollars per car)

For the week ending: 8/17/2023		Delivery period							
		Sep-23	Sep-22	Oct-23	Oct-22	Nov-23	Nov-22	Dec-23	Dec-22
BNSF	COT grain units	33	48	63	73	65	31	55	17
	COT grain single-car	55	126	35	156	36	170	42	80
UP	GCAS/vouchers	10	n/a	no offer	n/a	no offer	n/a	n/a	n/a

Note: Auction offerings are for single-car and unit train shipments only. Bids and offers represent a premium/discount to tariff rates. n/a = not available. BNSF = BNSF Railway; COT = Certificate of Transportation; UP = Union Pacific Railroad; and GCAS = Grain Car Allocation System. Minimum bids for UP GCAS/vouchers are \$10.
Source: USDA, Agricultural Marketing Service.

Primary auction market rates reflect offers and bids made between railroads and shippers for guaranteed car service. The secondary rail market information reflects trade values for service agreements traded between shippers that were originally purchased from the railroad carrier. The auction and secondary rail values are indicators of rail service quality and demand/supply. Bids and offers listed in the primary and secondary auctions are market indicators only and are not guaranteed prices.

Figure 4: Secondary market bids/offers for railcars to be delivered in September 2023



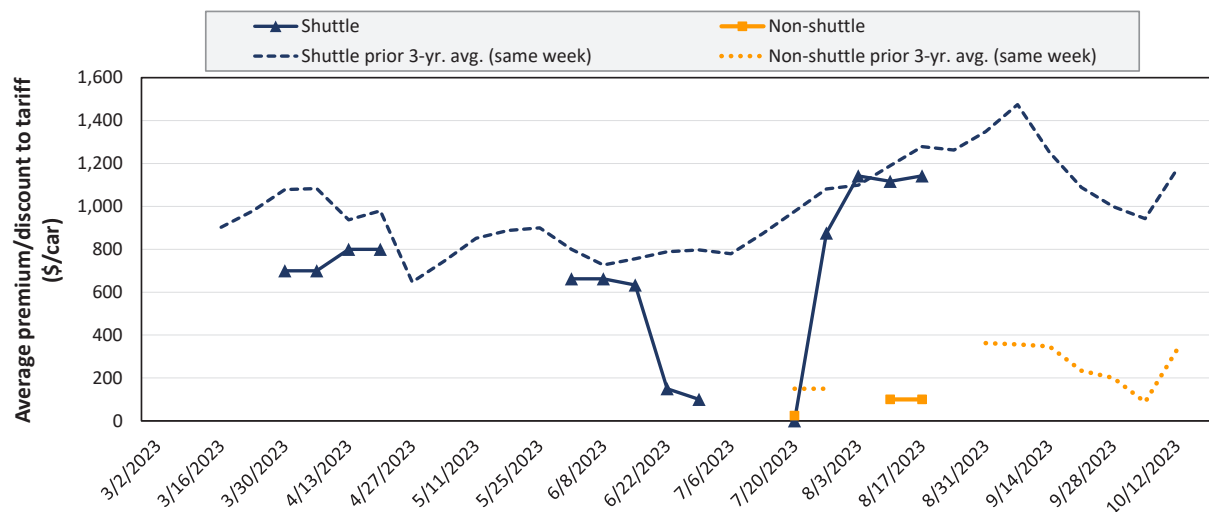
Average non-shuttle bids/offers fell \$63 this week, and are \$63 below the peak.

Average shuttle bids/offers fell \$146 this week and are \$317 below the peak.

8/17/2023	BNSF	UP
Non-Shuttle	\$113	\$213
Shuttle	\$13	-\$213

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

Figure 5: Secondary market bids/offers for railcars to be delivered in October 2023



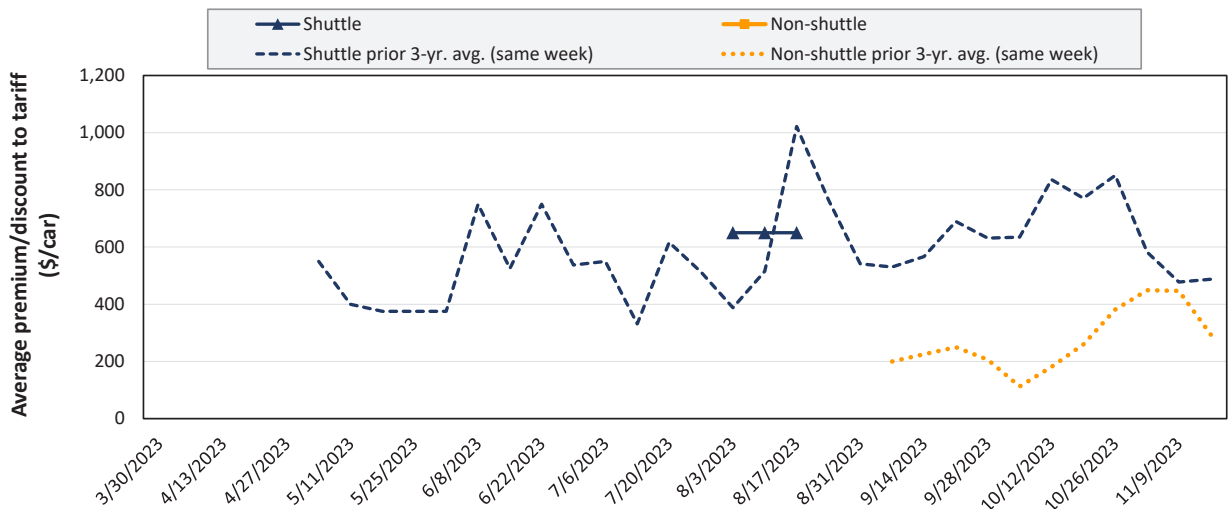
Average non-shuttle bids/offers are unchanged this week, and are at the peak.

Average shuttle bids/offers rose \$26 this week and are at the peak.

8/17/2023	BNSF	UP
Non-Shuttle	n/a	\$100
Shuttle	\$784	\$1,500

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

Figure 6: Secondary market bids/offers for railcars to be delivered in November 2023



Average non-shuttle bids/offers are unchanged this week, and are at the peak.

Average shuttle bids/offers rose \$26 this week and are at the peak.

8/17/2023	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	\$650	n/a

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
 Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

Table 5. Weekly secondary railcar market (dollars per car)

For the week ending: 8/17/2023		Delivery period					
		Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24
Non-shuttle	BNSF-GF	113	n/a	n/a	n/a	n/a	n/a
	Change from last week	-37	n/a	n/a	n/a	n/a	n/a
	Change from same week 2022	-38	n/a	n/a	n/a	n/a	n/a
	UP-Pool	213	100	n/a	n/a	n/a	n/a
	Change from last week	-87	0	n/a	n/a	n/a	n/a
	Change from same week 2022	-113	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	13	784	650	350	500	n/a
	Change from last week	-230	-216	0	0	0	n/a
	Change from same week 2022	-465	-1,166	-1,358	-250	n/a	n/a
	UP-Pool	-213	1,500	n/a	n/a	n/a	n/a
	Change from last week	-63	267	n/a	n/a	n/a	n/a
	Change from same week 2022	-704	-300	n/a	n/a	n/a	n/a
	CP-GF	n/a	850	n/a	n/a	n/a	n/a
	Change from last week	n/a	0	n/a	n/a	n/a	n/a
Change from same week 2022	n/a	150	n/a	n/a	n/a	n/a	

Note: Bids and offers represent a premium/discount to tariff rates; n/a = not available; GF = guaranteed freight; Pool = guaranteed pool; BNSF = BNSF Railway; UP = Union Pacific Railroad; CP = Canadian Pacific Railway.
 Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

The tariff rail rate is the base price of freight rail service. Together with fuel surcharges and any auction and secondary rail values, the tariff rail rate constitutes the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. However, during times of high rail demand or short supply, high auction and secondary rail values can exceed the cost of the tariff rate plus fuel surcharge.

Table 6. Tariff rail rates for unit train shipments

August 2023	Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel	Percent Change Y/Y
Wheat	Wichita, KS	St. Louis, MO	\$4,095	\$177	\$42.42	\$1.15	1
	Grand Forks, ND	Duluth-Superior, MN	\$4,008	\$42	\$40.22	\$1.09	0
	Wichita, KS	Los Angeles, CA	\$7,340	\$214	\$75.02	\$2.04	-11
	Wichita, KS	New Orleans, LA	\$4,825	\$312	\$51.01	\$1.39	-2
	Sioux Falls, SD	Galveston-Houston, TX	\$7,111	\$176	\$72.36	\$1.97	-9
	Colby, KS	Galveston-Houston, TX	\$5,075	\$341	\$53.79	\$1.46	-3
	Amarillo, TX	Los Angeles, CA	\$5,121	\$475	\$55.57	\$1.51	-9
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$352	\$43.22	\$1.10	-8
	Toledo, OH	Raleigh, NC	\$8,551	\$396	\$88.84	\$2.26	0
	Des Moines, IA	Davenport, IA	\$2,655	\$75	\$27.11	\$0.69	3
	Indianapolis, IN	Atlanta, GA	\$6,593	\$297	\$68.42	\$1.74	1
	Indianapolis, IN	Knoxville, TN	\$5,564	\$192	\$57.16	\$1.45	2
	Des Moines, IA	Little Rock, AR	\$4,250	\$219	\$44.38	\$1.13	0
	Des Moines, IA	Los Angeles, CA	\$6,130	\$638	\$67.21	\$1.71	-6
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,472	\$513	\$39.57	\$1.08	-29
	Toledo, OH	Huntsville, AL	\$7,037	\$282	\$72.68	\$1.98	0
	Indianapolis, IN	Raleigh, NC	\$7,843	\$401	\$81.87	\$2.23	0
	Indianapolis, IN	Huntsville, AL	\$5,689	\$190	\$58.39	\$1.59	2
	Champaign-Urbana, IL	New Orleans, LA	\$4,865	\$352	\$51.81	\$1.41	-4

Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel of wheat and soybeans. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 7. Tariff rail rates for shuttle train shipments

August 2023	Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel	Percent Change Y/Y
Wheat	Great Falls, MT	Portland, OR	\$4,543	\$123	\$46.34	\$1.26	-6
	Wichita, KS	Galveston-Houston, TX	\$4,611	\$96	\$46.74	\$1.27	-7
	Chicago, IL	Albany, NY	\$7,090	\$374	\$74.12	\$2.02	0
	Grand Forks, ND	Portland, OR	\$6,201	\$213	\$63.69	\$1.73	-8
	Grand Forks, ND	Galveston-Houston, TX	\$5,549	\$222	\$57.31	\$1.56	-10
	Colby, KS	Portland, OR	\$5,923	\$560	\$64.38	\$1.75	-9
Corn	Minneapolis, MN	Portland, OR	\$5,660	\$259	\$58.78	\$1.49	-10
	Sioux Falls, SD	Tacoma, WA	\$5,620	\$237	\$58.17	\$1.48	-9
	Champaign-Urbana, IL	New Orleans, LA	\$4,170	\$352	\$44.91	\$1.14	-3
	Lincoln, NE	Galveston-Houston, TX	\$4,360	\$138	\$44.67	\$1.13	-4
	Des Moines, IA	Amarillo, TX	\$4,670	\$275	\$49.11	\$1.25	-1
	Minneapolis, MN	Tacoma, WA	\$5,660	\$257	\$58.76	\$1.49	-9
Soybeans	Council Bluffs, IA	Stockton, CA	\$5,580	\$266	\$58.05	\$1.47	-10
	Sioux Falls, SD	Tacoma, WA	\$6,350	\$237	\$65.42	\$1.78	-7
	Minneapolis, MN	Portland, OR	\$6,400	\$259	\$66.13	\$1.80	-8
	Fargo, ND	Tacoma, WA	\$6,250	\$211	\$64.16	\$1.75	-6
	Council Bluffs, IA	New Orleans, LA	\$5,095	\$406	\$54.63	\$1.49	-4
	Toledo, OH	Huntsville, AL	\$5,277	\$282	\$55.20	\$1.50	1
	Grand Island, NE	Portland, OR	\$5,730	\$573	\$62.59	\$1.70	-3

Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel of wheat and soybeans. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge.

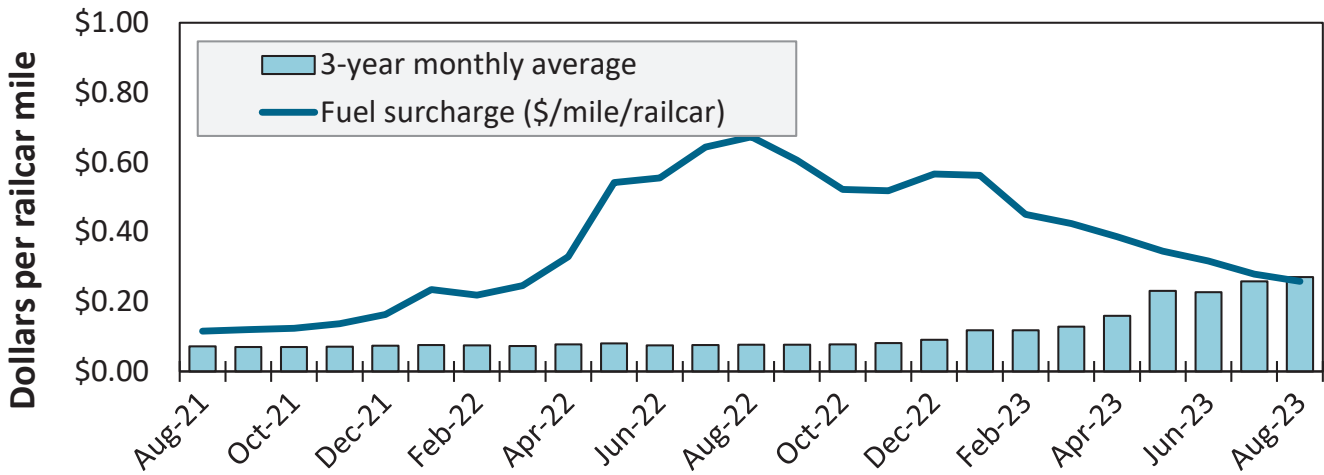
Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8. Tariff rail rates for U.S. bulk grain shipments to Mexico

December 2021	Origin state	Destination region	Tariff rate per car	Fuel surcharge per car	Tariff rate plus fuel surcharge per:		Percent change Y/Y
					metric ton	bushel	
Wheat	MT	Chihuahua, CI	\$7,699	\$0	\$78.67	\$2.14	4
	OK	Cuautitlan, EM	\$6,900	\$230	\$72.85	\$1.98	6
	KS	Guadalajara, JA	\$7,619	\$719	\$85.19	\$2.32	7
	TX	Salinas Victoria, NL	\$4,420	\$138	\$46.57	\$1.27	4
Corn	IA	Guadalajara, JA	\$9,102	\$663	\$99.77	\$2.53	6
	SD	Celaya, GJ	\$8,300	\$0	\$84.81	\$2.15	2
	NE	Queretaro, QA	\$8,322	\$462	\$89.75	\$2.28	5
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlalnepantla, EM	\$7,687	\$450	\$83.14	\$2.11	5
	SD	Torreón, CU	\$7,825	\$0	\$79.95	\$2.03	2
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$614	\$94.63	\$2.57	5
	NE	Guadalajara, JA	\$9,207	\$646	\$100.67	\$2.74	5
	IA	El Castillo, JA	\$9,510	\$0	\$97.17	\$2.64	1
	KS	Torreón, CU	\$8,109	\$466	\$87.61	\$2.38	5
Sorghum	NE	Celaya, GJ	\$7,932	\$597	\$87.15	\$2.21	6
	KS	Queretaro, QA	\$8,108	\$287	\$85.77	\$2.18	3
	NE	Salinas Victoria, NL	\$6,713	\$231	\$70.94	\$1.80	3
	NE	Torreón, CU	\$7,225	\$438	\$78.29	\$1.99	6

Note: Rates are based on published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements. The table assumes 97.87 metric tons per car, 56 pounds per bushel for corn and sorghum, and 60 pounds per bushel for wheat and soybeans. Percentage change year over year (Y/Y) is calculated using the tariff rate plus fuel surcharge. **As of January 1, both BNSF and Union Pacific changed their billing and reporting of rates to Mexico. As we incorporate the change, table 8 updates will be delayed.** Source: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

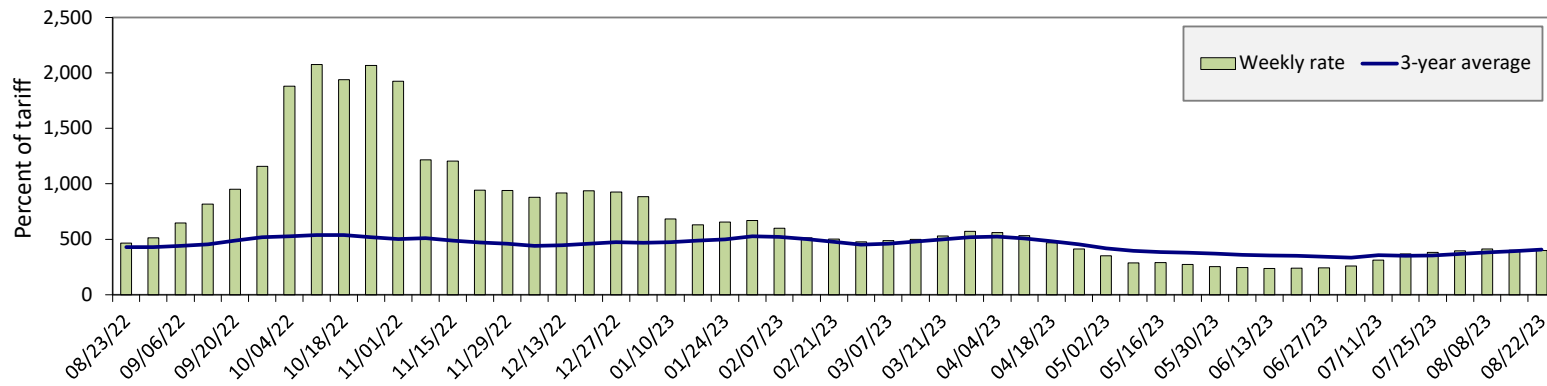
Figure 7. Railroad fuel surcharges, North American weighted average



August 2023: \$0.26/mile, down 2 cents from last month's surcharge of \$0.28/mile; down 41 cents from the August 2022 surcharge of \$0.67/mile; and down 1 cents from the August prior 3-year average of \$0.27/mile.

Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year. Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Figure 8. Illinois River barge freight rate



For the week ending August 22: 1 percent lower than the previous week; and 14 percent lower than last year; and 2 percent lower than the 3-year average.

Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year average.
Source: USDA, Agricultural Marketing Service.

Table 9. Weekly barge freight rates: Southbound only

Measure	Date	Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate	8/22/2023	475	415	398	392	409	409	414
	8/15/2023	465	402	402	359	396	396	388
\$/ton	8/22/2023	29.40	22.08	18.47	15.64	19.18	16.52	13.00
	8/15/2023	28.78	21.39	18.65	14.32	18.57	16.00	12.18
Measure	Time Period	Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Current week % change from the same week	Last year	-14	-15	-14	1	-9	-9	10
	3-year avg.	-1	2	-	29	16	16	40
Rate	September	664	650	632	625	643	643	651
	November	632	568	560	496	552	552	466

Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; "-" = data not available.
Source: USDA, Agricultural Marketing Service.

Figure 9. Benchmark tariff rates



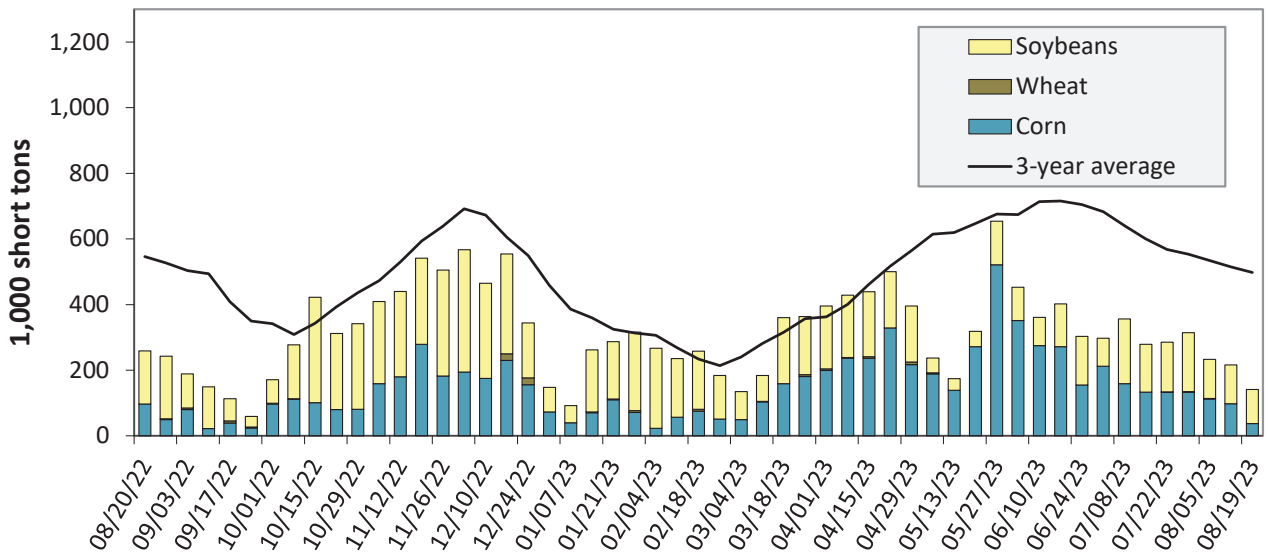
Calculating barge rate per ton:

$$(Rate * 1976 \text{ tariff benchmark rate per ton}) / 100$$

Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.

Source: USDA, Agricultural Marketing Service.

Figure 10. Barge movements on the Mississippi River (Locks 27-Granite City, IL)



For the week ending August 19: 46 percent lower than last year and 72 percent lower than the 3-year average.

Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

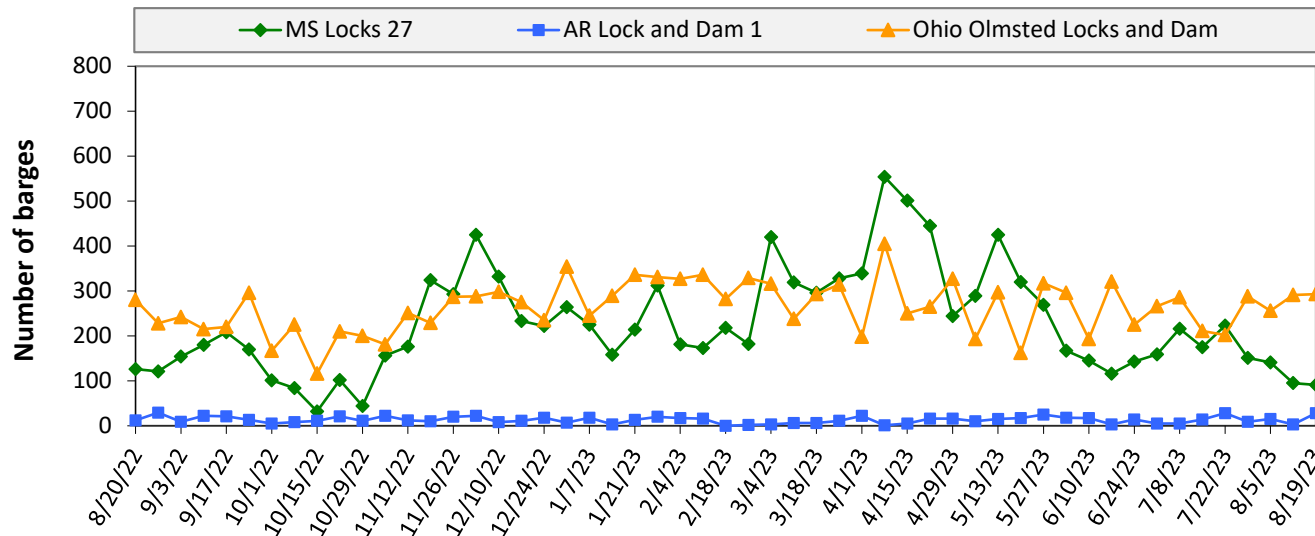
Table 10. Barged grain movements (1,000 tons)

For the week ending 08/19/2023	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	13	0	31	0	44
Mississippi River (Winfield, MO (L25))	22	0	70	0	92
Mississippi River (Alton, IL (L26))	41	0	95	0	136
Mississippi River (Granite City, IL (L27))	37	0	104	0	141
Illinois River (La Grange)	5	0	3	0	8
Ohio River (Olmsted)	5	18	11	9	43
Arkansas River (L1)	0	5	2	0	6
Weekly total - 2023	42	23	116	9	189
Weekly total - 2022	120	47	192	2	361
2023 YTD	8,715	950	6,995	200	16,861
2022 YTD	12,904	1,329	8,157	182	22,573
2023 as % of 2022 YTD	68	71	86	110	75
Last 4 weeks as % of 2022	47	67	60	215	56
Total 2022	16,437	1,594	14,464	232	32,727

Note: "Other" refers to oats, barely, sorghum, and rye. Total may not add up due to rounding. YTD = year to date. Weekly total, YTD, and calendar year total include Mississippi River lock 27, Ohio River Olmsted lock, and Arkansas Lock 1. "L" (as in "L15") refers to a lock, locks, or lock and dam facility. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

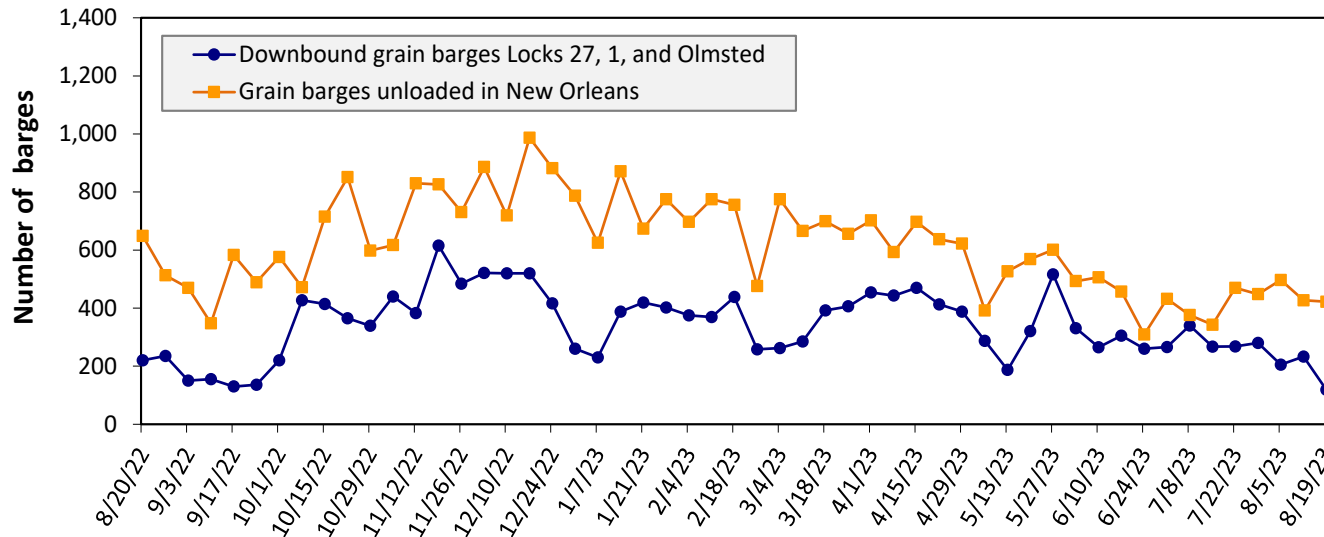
Figure 11. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending August 19: 412 barges transited the locks, 23 barges more than the previous week, and 8 percent lower than the 3-year average.

Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

Figure 12. Grain barges for export in New Orleans region



For the week ending August 19: 119 barges moved down river, 114 fewer than the previous week; 422 grain barges unloaded in the New Orleans Region, 1 percent fewer than the previous week.

Note: Olmsted = Olmsted Locks and Dam. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

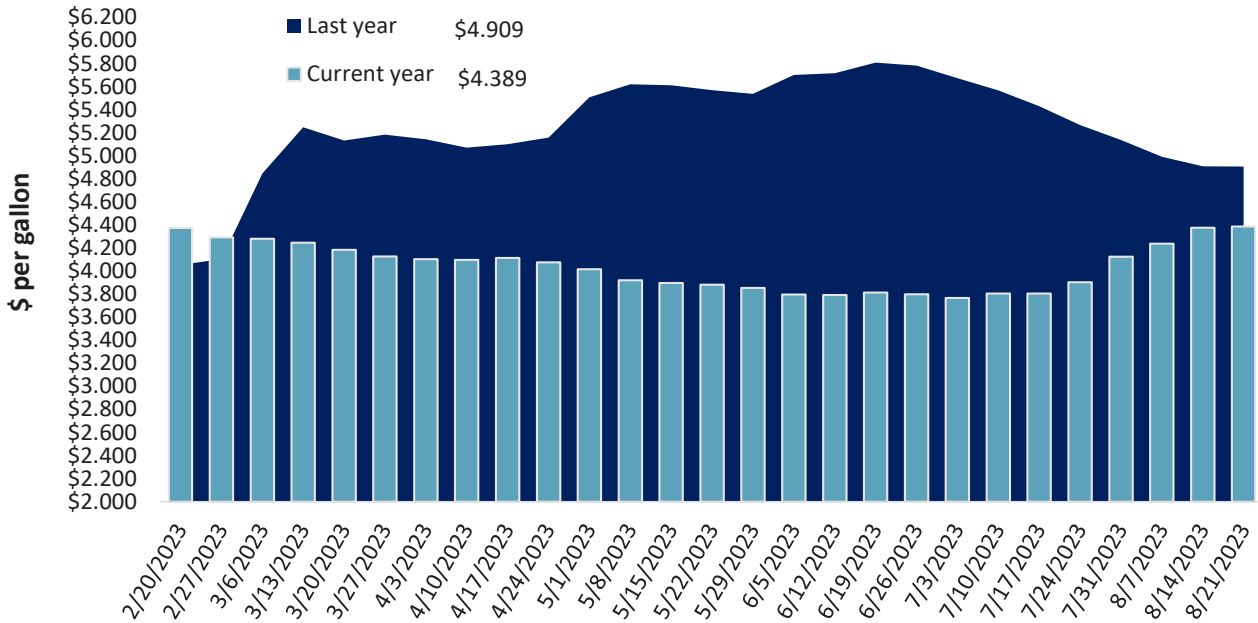
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11. Retail on-highway diesel prices, week ending 8/21/2023 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.422	0.020	-0.500
	New England	4.414	0.044	-0.708
	Central Atlantic	4.553	0.054	-0.656
	Lower Atlantic	4.374	0.003	-0.421
II	Midwest	4.302	-0.015	-0.588
III	Gulf Coast	4.095	0.000	-0.524
IV	Rocky Mountain	4.500	0.106	-0.385
V	West Coast	5.140	0.054	-0.408
	West Coast less California	4.794	0.084	-0.336
	California	5.535	0.017	-0.494
Total	United States	4.389	0.011	-0.520

Note: Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel. On June 13, 2022, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.
 Source: U.S. Department of Energy, Energy Information Administration.

Figure 13. Weekly diesel fuel prices, U.S. average



For the week ending August 21, the U.S. average diesel fuel price increased 1.1 cents from the previous week to \$4.389 per gallon, 52.0 cents below the same week last year.

Note: On June 13, 2022, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.
 Source: U.S. Department of Energy, Energy Information Administration.

Table 12. U.S. export balances and cumulative exports (1,000 metric tons)

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 8/10/2023	710	678	1,467	655	96	3,605	2,754	2,036	8,396
	This week year ago	1,471	866	1,489	1,420	109	5,355	3,209	4,076	12,640
	Last 4 wks. as % of same period 2021/22	45	89	87	43	72	64	100	57	71
Current shipped (cumulative) exports sales	2022/23 YTD	567	1,009	970	593	24	3,164	37,794	51,210	92,169
	2021/22 YTD	1,163	745	1,011	521	18	3,458	57,741	55,482	116,681
	YTD 2022/23 as % of 2021/22	49	135	96	114	135	92	65	92	79
	Total 2021/22	7,172	2,786	5,254	3,261	196	18,669	59,764	57,189	135,622
	Total 2020/21	8,422	1,790	7,500	6,438	656	24,807	66,958	60,571	152,335

Note: The marketing year for wheat is Jun. 1 to May 31 and, for corn and soybeans, Sep. 1 to Aug. 31. YTD = year-to-date; wks. = weeks.

Source: USDA, Foreign Agricultural Service.

Table 13. Top 5 importers of U.S. corn

For the week ending 8/10/2023	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2019-21 (1,000 mt)
	YTD MY 2023/24	YTD MY 2022/23	YTD MY 2021/22		
Mexico	3,830	15,360	16,879	-9	15,227
China	272	7,584	14,796	-49	12,616
Japan	908	6,839	10,118	-32	10,273
Columbia	50	2,388	4,403	-46	4,398
Korea	1	821	1,476	-44	2,563
Top 5 importers	5,061	32,992	47,672	-31	45,077
Total U.S. corn export sales	6,678	40,549	60,950	-33	56,665
% of YTD current month's export projection	13%	98%	97%		
Change from prior week	705	233	99		
Top 5 importers' share of U.S. corn export sales	76%	81%	78%		80%
USDA forecast August 2023	52,163	41,349	62,901	-34	
Corn use for ethanol USDA forecast, August 2023	134,620	132,715	135,281	-2	

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2021/22 (Sep. 1 – Aug. 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = carryover plus accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date.

Source: USDA, Foreign Agricultural Service.

Table 14. Top 5 importers of U.S. soybeans

For the week ending 8/10/2023	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2019-21 (1,000 mt)
	YTD MY 2023/24	YTD MY 2022/23	YTD MY 2021/22		
China	4692	31,256	30,615	2	27,283
Mexico	1199	4,695	5,465	-14	4,929
Egypt	63	1,151	4,082	-72	3,553
Japan	194	2,347	2,576	-9	2,266
Indonesia	83	1,872	1,800	4	2,116
Top 5 importers	6,231	41,321	44,538	-7	40,147
Total U.S. soybean export sales	10,593	53,246	59,558	-11	54,231
% of YTD current month's export projection	21%	99%	102%		
Change from prior week	1,408	94	97		
Top 5 importers' share of U.S. soybean export sales	59%	78%	75%		74%
USDA forecast, August 2023	49,728	53,951	58,638	-8	

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2021/22 (Sep. 1 – Aug. 31). “Total commitments” = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments’ change (net sales) from prior week could include revisions from previous week’s outstanding sales or accumulated sales. In rightmost column, “Exports” = carryover plus accumulated export (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date.
Source: USDA, Foreign Agricultural Service.

Table 15. Top 10 importers of all U.S. wheat

For the week ending 8/10/2023	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2020-22 (1,000 mt)
	YTD MY 2023/24	YTD MY 2022/23		
Mexico	1,326	1,571	-16	3,397
Philippines	1,001	1,236	-19	2,615
Japan	810	810	0	2,281
China	157	273	-43	1,740
Korea	409	605	-32	1,426
Nigeria	104	408	-74	1,276
Taiwan	452	269	68	944
Thailand	155	182	-15	643
Columbia	141	314	-55	537
Indonesia	143	81	77	469
Top 10 importers	4,699	5,749	-18	15,327
Total U.S. wheat export sales	6,770	8,813	-23	20,411
% of YTD current month's export projection	35%	43%		
Change from prior week	360	207		
Top 10 importers' share of U.S. wheat export sales	69%	65%		75%
USDA forecast, August 2023	19,074	20,681	-8	

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2021/22 (Sep. 1 – Aug. 31). “Total commitments” = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments’ change (net sales) from prior week could include revisions from previous week’s outstanding sales or accumulated sales. In rightmost column, “Exports” = carryover plus accumulated export (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date.
Source: USDA, Foreign Agricultural Service.

Table 16. Grain inspections for export by U.S. port region (1,000 metric tons)

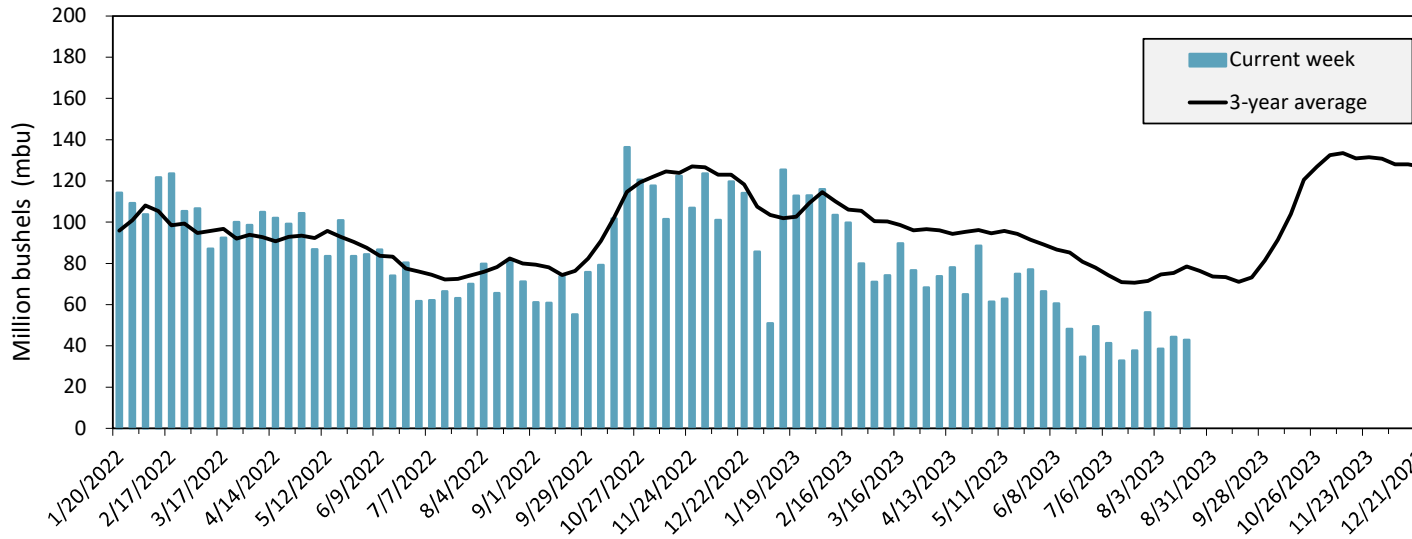
Port regions	Commodity	For the week ending 08/17/2023	Previous week	Current week as % of previous	2023 YTD	2022 YTD	2023 YTD as % of 2022 YTD	Last 4-weeks as % of:		2022 total
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Wheat	180	140	129	6,417	5,930	108	75	56	9,836
	Corn	0	0	n/a	3,923	8,686	45	0	0	9,615
	Soybeans	0	0	n/a	3,533	4,925	72	0	0	14,178
	Total	180	140	129	13,873	19,540	71	41	35	33,629
Mississippi Gulf	Wheat	68	79	86	2,484	2,899	86	118	139	4,053
	Corn	300	264	114	15,881	24,583	65	62	50	30,781
	Soybeans	235	379	62	14,728	14,846	99	51	60	31,283
	Total	603	723	83	33,092	42,328	78	63	63	66,116
Texas Gulf	Wheat	10	5	185	1,319	2,062	64	12	12	3,421
	Corn	0	26	2	203	522	39	100	96	648
	Soybeans	0	0	n/a	52	2	n/a	n/a	0	685
	Total	10	31	33	1,574	2,586	61	30	27	4,754
Interior	Wheat	68	57	120	1,564	1,876	83	81	90	2,912
	Corn	173	158	109	5,828	5,815	100	119	99	8,961
	Soybeans	93	53	174	3,675	4,512	81	66	77	7,109
	Total	334	269	124	11,067	12,204	91	92	90	18,982
Great Lakes	Wheat	0	0	n/a	171	167	102	0	0	395
	Corn	0	0	n/a	23	125	18	n/a	0	158
	Soybeans	0	0	n/a	31	239	13	n/a	0	760
	Total	0	0	n/a	224	531	42	0	0	1,312
Atlantic	Wheat	1	2	85	78	119	65	14	29	169
	Corn	0	3	0	81	224	36	19	24	309
	Soybeans	5	7	66	1,238	1,576	79	99	71	2,867
	Total	6	11	53	1,396	1,919	73	37	48	3,345
U.S. total from ports	Wheat	328	283	116	12,032	13,054	92	77	69	20,786
	Corn	474	451	105	25,938	39,955	65	66	53	50,471
	Soybeans	333	440	76	23,257	26,099	89	46	56	56,882
	Total	1,134	1,174	97	61,227	79,108	77	61	58	128,139

Note: Data include revisions from prior weeks; some regional totals may not add exactly because of rounding. YTD = year-to-date; n/a = not applicable or no change.

Source: USDA, Federal Grain Inspection Service.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2019.

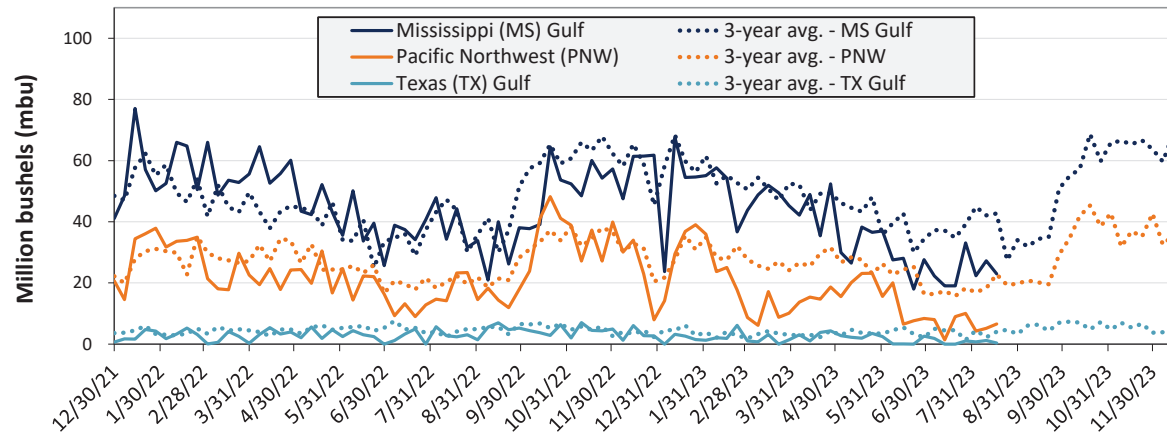
Figure 14. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Aug. 17: 42.9 mbu of grain inspected, down 3 percent from the previous week, down 47 percent from the same week last year, and down 45 percent from the 3-year average.

Note: 3-year average consists of 4-week running average.
Source: USDA, Federal Grain Inspection Service.

Figure 15. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 08/17/23 inspections (mbu):

MS Gulf: 23

PNW: 6.6

TX Gulf: 0.4

Percent change from	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 16	down 69	down 18	up 29
Last year (same week)	down 48	down 84	down 50	down 71
3-year average (4-week moving average)	down 46	down 88	down 48	down 65

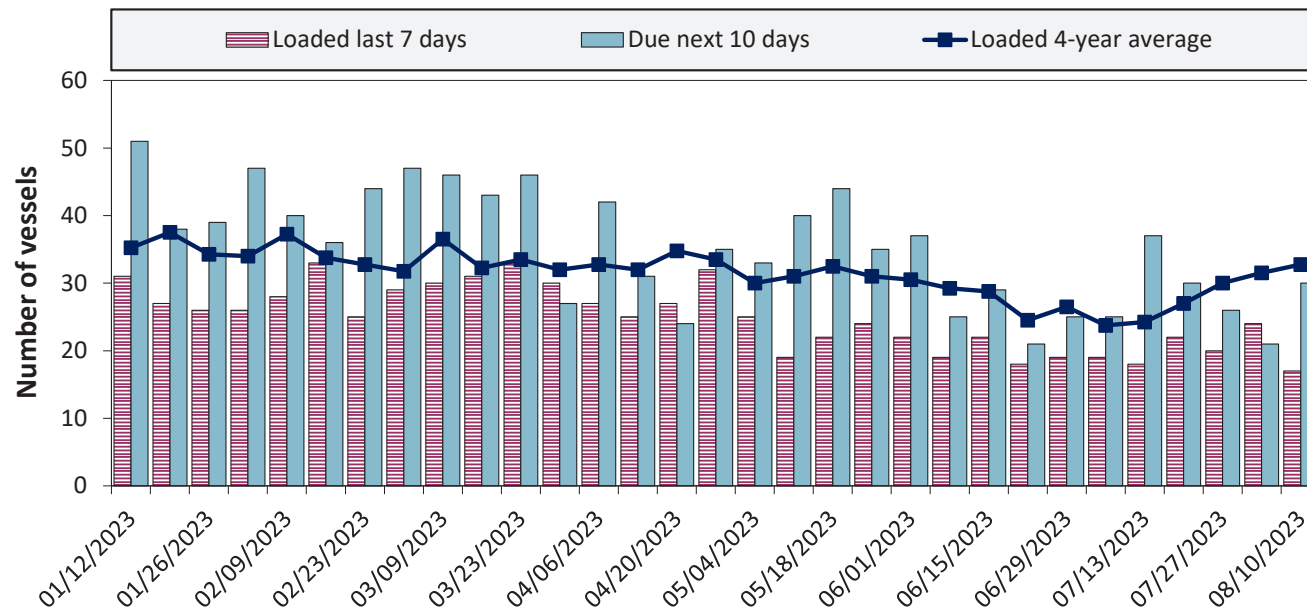
Source: USDA, Federal Grain Inspection Service.

Table 17. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
8/17/2023	18	18	33	3
8/10/2023	18	17	30	5
2022 range	(14...61)	(18...39)	(28...62)	(5...23)
2022 average	30	28	44	13

Note: The data are voluntarily submitted and may not be complete.
 Source: USDA, Agricultural Marketing Service.

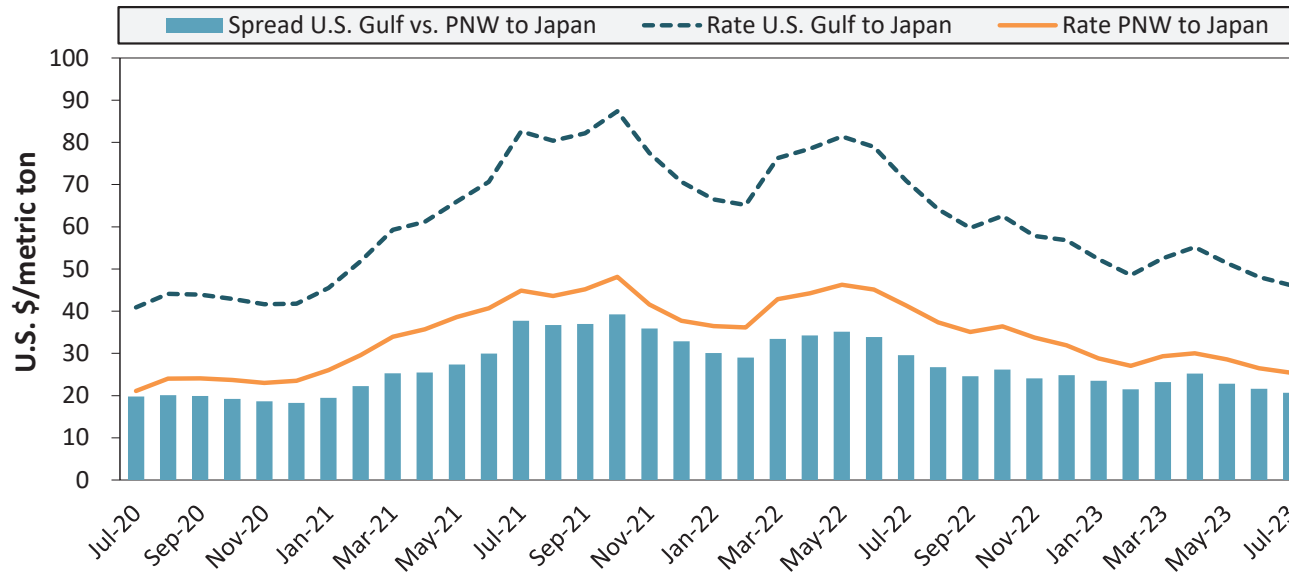
Figure 16. U.S . Gulf vessel loading activity



Week ending 08/17/23, number of vessels	Loaded	Due
Change from last year	-31%	3%
Change from 4-year average	-38%	-9%

Note: U.S. Gulf includes Mississippi, Texas, and east Gulf
 Source: USDA, Agricultural Marketing Service.

Figure 17. U.S . Grain vessel rates, U.S. to Japan



Ocean rates	U.S. Gulf	PNW	Spread
July 2023	\$46	\$25	\$21
Change from July 2022	-35%	-38%	-30%
Change from 4-year average	-24%	-24%	-24%

Note: PNW = Pacific Northwest
Source: O'Neil Commodity Consulting.

Table 18. Ocean freight rates for selected shipments, week ending 08/19/2023

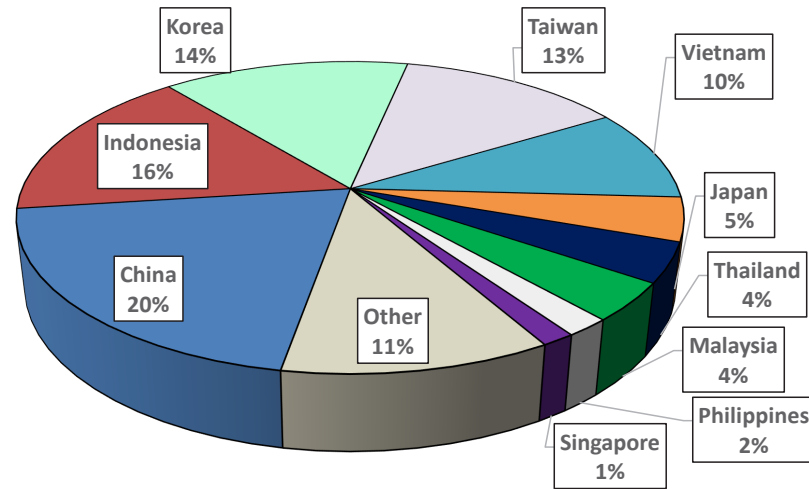
Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Heavy grain	May 2, 2023	50,000	56.70
U.S. Gulf	Japan	Heavy grain	May 1, 2023	50,000	54.80
U.S. Gulf	Japan	Heavy grain	Nov 1/10, 2022	50,000	79.25
U.S. Gulf	Jamaica	Wheat	Jun 20/30, 2023	4,400	63.00 op 66.00
U.S. Gulf	Mexico	Soybean Meal	Oct 1/10, 2023	17,250	87.13
U.S. Gulf	Dominican Republic	Soybean Meal	Oct 1/10, 2023	17,250	87.13
PNW	Indonesia	Soybean Meal	Jul 21/31, 2023	35,000	106.00
PNW	N. China	Heavy grain	Apr 21/27, 2023	63,000	28.00
PNW	N. China	Heavy grain	May 1/4, 2023	66,000	29.00
Brazil	S. Korea	Heavy grain	Jun 15/Jul 15, 2023	68,000	45.15
Brazil	S. Korea	Soybean Meal	Jun 1, 2023	60,000	53.75
Brazil	China	Heavy grain	Jul 1/31, 2023	63,000	41.50
Brazil	China	Heavy grain	May 5/10, 2023	65,000	36.50
Brazil	N. China	Heavy grain	Apr 21/30, 2023	66,000	40.60

Note: 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels. Rates shown are per metric ton (1 metric ton = 2,204.62 pounds), free on board (F.O.B), except where otherwise indicated. op = option

Source: Maritime Research, Inc.

In 2020, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 66 percent of U.S. waterborne grain exports in 2020 went to Asia, of which 14 percent were moved in containers. Approximately 95 percent of U.S. waterborne containerized grain exports were destined for Asia.

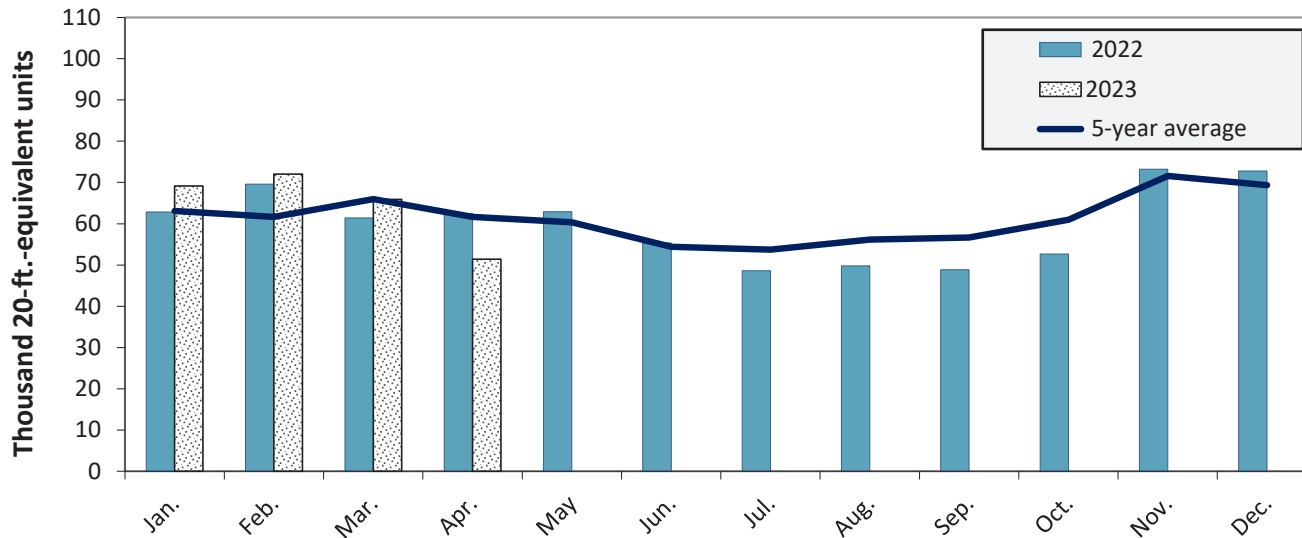
Figure 18. Top 10 destination markets for U.S. containerized grain exports, Jan-Apr 2023



Note: The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, and 230990.

Source: USDA, Agricultural Marketing Service analysis of Port Import/Export Reporting Services (PIERS) data.

Figure 19. Monthly shipments of U.S. containerized grain exports



April 2023: Containerized grain shipments were down 17.6 percent from last year and down 16.6 percent from the 5-year average.

Note: ft. = foot. The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, and 230990.

Source: USDA, Agricultural Marketing Service analysis of Port Import/Export Reporting Services (PIERS) data.

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